

OFFICIAL STATEMENT

**ALTA LOMA SCHOOL DISTRICT
SAN BERNARDINO COUNTY, CALIFORNIA**

\$750,000 PRINCIPAL AMOUNT

\$405,000 Principal Amount Election 1974 Bonds, Series 2
(General Obligations)

and

\$345,000 Principal Amount Election 1976 Bonds, Series 1
(General Obligations)

INSTITUTE OF GOVERNMENTAL

NOV - 8 1976

UNIVERSITY OF CALIFORNIA

Bids to be received by the Clerk of the Board of Supervisors of San Bernardino County, County Civic Building, 175 West Fifth Street, San Bernardino, California 92415 at 10:00 A.M. Monday, November 22, 1976.

School administration San Bernardino co
" architecture " "
Public debt County " "
Investments Public securities

ALTA LOMA SCHOOL DISTRICT
San Bernardino County, California

BOARD OF TRUSTEES

Nancy K. Kettle, President

Robert S. Frost, Clerk
Walter D. Achuff

Earle Anderson
Paul Sage

DISTRICT ADMINISTRATION

Floyd M. Stork, Superintendent of Schools

SAN BERNARDINO COUNTY, CALIFORNIA
BOARD OF SUPERVISORS

Dennis Hansberger, Chairman

James L. Mayfield, Vice Chairman
Joe Kamansky

Nancy E. Smith
Robert O. Townsend

SAN BERNARDINO COUNTY OFFICIALS

Leona Rapoport, Clerk of the Board of Supervisors

M. Crane Kitchel, Acting County Counsel
Craig S. Jordan, Deputy County Counsel

John H. Bulmer, Auditor-Controller
John A. Gartner, Tax Collector-Treasurer

PROFESSIONAL SERVICES

O'Melveny & Myers, Los Angeles
Bond Counsel

Stone & Youngberg Municipal Financing Consultants, Inc.
San Francisco and Los Angeles
Financing Consultants

THE DATE OF THIS OFFICIAL STATEMENT IS NOVEMBER 1, 1976

76 04029

INSTITUTE OF GOVERNMENTAL
STUDIES LIBRARY

MAR 20 2025

UNIVERSITY OF CALIFORNIA

TO WHOM IT MAY CONCERN:

The purpose of this Official Statement is to supply information to prospective bidders on, and buyers of, \$405,000 principal amount Election 1974, Series 2 Bonds and \$345,000 principal amount Election 1976, Series 1 Bonds, proposed to be issued by the Board of Supervisors of San Bernardino County on behalf of the Alta Loma School District.

The material contained in this Official Statement was prepared by Stone & Youngberg Municipal Financing Consultants, Inc., in the capacity of financing consultants to the District (which firm will receive compensation from the District contingent upon the sale and delivery of the Bonds).

This Official Statement is not to be construed as a contract with the purchasers of the Election 1974, Series 2 Bonds or the Election 1976, Series 1 Bonds. Statements contained in this Official Statement which involve estimates, forecasts or matters of opinion, whether or not expressly so described herein, are intended solely as such and are not to be construed as representations of fact.

The opinion of O'Melveny & Myers, Los Angeles, California, Bond Counsel to the District, will be furnished to the successful bidder (see the section entitled "Legal Opinion" herein).

No dealer, broker, salesman or other person has been authorized by the District to give any information or to make any representations other than those contained herein and, if given or made, such other information or representation must not be relied upon as having been authorized by any of the foregoing. This Official Statement does not constitute an offer to sell or the solicitation of any offer to buy nor shall there be any sale of the bonds by a person in any jurisdiction in which it is unlawful for such person to make such an offer, solicitation or sale.

The execution and distribution of this Official Statement have been authorized by the District.

FLOYD M. STORK
SUPERINTENDENT
ALTA LOMA SCHOOL DISTRICT

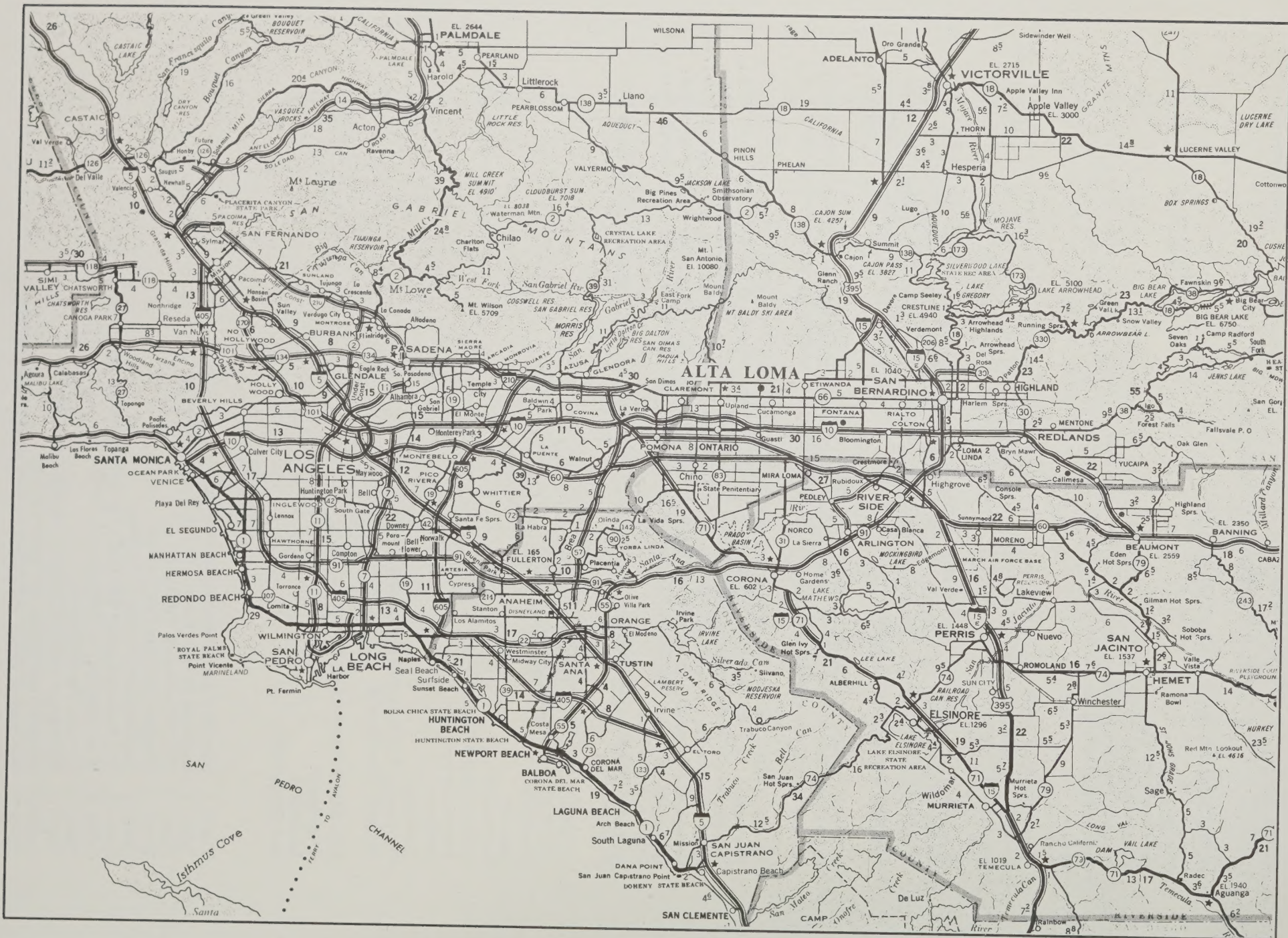
November 1, 1976

TABLE OF CONTENTS

INTRODUCTION	1
THE BONDS	2
Authority for Issuance	2
Terms of Sale	2
Description of the Bonds	2
Redemption Provisions	3
Payment	3
Registration	3
Legal Opinion	3
Security	3
Tax Exempt Status	3
Legality for Investment	3
No Litigation	4
Purpose of Issue	4
Estimated Debt Service	4
THE IMPROVEMENT PROGRAM	6
DISTRICT ORGANIZATION AND FINANCIAL DATA	7
Organization	7
Facilities and Attendance	7
Assessed Valuations	8
Revenue Limitations	9
Tax Rates	9
Tax Levies, Collections, and Delinquencies	11
Fund Balances	11
General Fund Income and Expenditures	11
Direct and Estimated Overlapping Bonded Debt	13
Other Indebtedness	15
Employer-Employee Relations	15
Pension Plans	15
ECONOMY OF THE DISTRICT	17
Population and Housing	17
Employment	18
Industry	19
Commercial	19
Construction Activity	20
Transportation	21
Utilities	21
Education	21
Community Facilities and Recreation	22
Possible Incorporation	23
SAN BERNARDINO VALLEY	24
Employment	24
Agriculture	26
New Construction	27

TABLES

Table 1	Estimated Bond Service Requirements	5
Table 2	Assessed Valuation and Average Daily Attendance	7
Table 3	1976/77 Assessed Valuation	8
Table 4	Assessed Valuation by Tax Roll	8
Table 5	Tax Rate Distribution by Purpose	9
Table 6	Tax Code Area 5208 Tax Rates per \$100 Assessed Valuation	10
Table 7	Major Taxpayers, Fiscal Year 1976/77	10
Table 8	Secured Tax Delinquency	11
Table 9	Summary of General Fund Income and Expenditures	12
Table 10	General Fund Income and Expenditures	13
Table 11	Statement of Direct and Estimated Overlapping Bonded Debt	14



City of Alta Loma and vicinity.

INTRODUCTION

The \$405,000 principal amount of Election 1974 Bonds, Series 2 (the second and final series of a \$780,000 authorization) and \$345,000 principal amount of Election 1976 Bonds, Series 1 (the first series of a \$1,500,000 authorization) will be used to construct an addition to Jasper Elementary School, to construct the first increment of a fourth elementary school, and to purchase an additional school site.

The Alta Loma School District encompasses approximately 25 square miles in southwestern San Bernardino County and includes the unincorporated community of Alta Loma. The District extends north into the San Bernardino National Forest. Alta Loma is approximately 40 miles east of Los Angeles and 19 miles west of San Bernardino.

The District's agricultural lands which contain horse ranches, citrus groves, vineyards, and a winery are giving way to urban encroachment as high land costs and overcrowding in Los Angeles and Orange Counties cause residents of these areas to seek living space in San Bernardino County.

The growth in District population is reflected by studies of the County Planning Department. The San Bernardino County Planning Department compiles population and housing data for the Planning District which embraces Alta Loma, Etiwanda, and a small portion of Cucamonga. The 1970 Federal Census reported that the Planning District had a population of 10,552. In April of 1975, a special countywide census reported a population of 16,696 residents, a gain of 58 percent over the five year period.

Employment opportunities within the District are largely in education, trade, personal services, and manufacturing. The largest District employers are Chaffey College, the Alta Loma School District, the American Can Company, which employs 125 at a local plant producing plastic bottles, and Bennett Industries, a fabricator of steel shipping containers with a payroll of 80.

Commercial activity of the District is concentrated at two shopping centers. Taxable transactions are not available for Alta Loma, however, an indication of economic strength in the area can be obtained from the level of taxable transactions in the nearby incorporated communities of Upland, Ontario and Fontana. Taxable transactions in Upland increased from \$56,471,000 in 1972 to \$80,906,000 in 1975. The comparable figures for Ontario follow, \$131,543,000 in 1972 as compared to \$164,057,000 in 1975. Fontana reports a growth in taxable transactions from \$51,378,000 in 1972 to \$67,688,000 in 1975.

Upon delivery of Election 1974 Series 2 and Election 1976 Series 1 Bonds currently being offered for sale, the District's direct debt will be \$1,890,000 or 5.14 percent of assessed valuation and 1.22 percent of estimated real value. Net direct and estimated overlapping debt will be 11.15 percent and 2.65 percent of assessed valuation and estimated real value respectively.

THE BONDS

AUTHORITY FOR ISSUANCE

The \$405,000 principal amount Election 1974, Series 2 Bonds and the \$345,000 principal amount Election 1976, Series 1 Bonds of Alta Loma School District now being offered for sale are general obligations of the District and will be issued under provisions of Part 3, Division 16, Chapter 7 of the State of California Education Code, and pursuant to a resolution of the Board of Supervisors of San Bernardino County adopted on October 12, 1976.

The bonds represent two issues to be sold concurrently. The first issue: Election 1974, Series 2 represents the second series of a total authorization of \$780,000 approved by District voters on March 5, 1974; Series 1 Bonds in the amount of \$375,000, dated November 1, 1974, have previously been issued; \$405,000 principal amount will complete this \$780,000 authorization. The second issue: \$345,000 principal amount Election 1976, Series 1 represents the first series of a total authorization of \$1,500,000 approved by District voters on March 2, 1976.

TERMS OF SALE

Bids will be received by the Clerk of the Board of Supervisors of San Bernardino County at 10:00 a.m. on Monday, November 22, 1976 at the Office of the Clerk of the Board of Supervisors, County Civic Building, 175 West Fifth Street, San Bernardino, California. The bonds will be sold pursuant to the terms of sale contained in the Notice Inviting Bids dated October 12, 1976.

DESCRIPTION OF THE BONDS

The Election 1974, Series 2 Bonds and the Election 1976, Series 1 Bonds consist of \$750,000 aggregate principal amount dated December 1, 1976. The bonds, all in the denomination of \$5,000, will mature serially in consecutive numerical order from lower to higher as set forth in the following maturity schedules:

Date of Maturity (December 1)	Election 1974, Series 2 Amount of Bonds Maturing	Election 1976, Series 1 Amount of Bonds Maturing
1977	\$ 15,000	\$ --
1978	25,000	--
1979	25,000	--
1980	25,000	--
1981	30,000	--
1982	30,000	--
1983	30,000	--
1984	40,000	--
1985	60,000	--
1986	125,000	5,000
1987	--	70,000
1988	--	85,000
1989	--	150,000
1990	--	35,000

Interest on the bonds at a rate not to exceed seven percent per annum is payable for the first year on December 1, 1977 and semiannually thereafter on June 1 and December 1.

REDEMPTION PROVISIONS

No bonds shall be subject to call or redemption prior to maturity.

PAYMENT

Both principal and interest are payable at the Office of the San Bernardino County Treasurer-Tax Collector.

REGISTRATION

The bonds will be coupon bonds, registrable only as to both principal and interest.

LEGAL OPINION

The legal opinion of O'Melveny & Myers, Bond Counsel, attesting to the validity of the bonds, will be supplied to the original purchasers of the bonds without charge. A copy of the legal opinion, certified by the County Treasurer-Tax Collector, in whose office the original is to be filed, will be printed on each bond, without cost to the successful bidder.

The statements of law and legal conclusions set forth herein under the captions "Authority for Issuance", "Terms of Sale", "Description of the Bonds", "Redemption Provisions", "Payment", "Registration", "Security", "Tax Exempt Status", and "Legality for Investment" have been reviewed by Bond Counsel. Bond Counsel's employment is limited to a review of the legal proceedings required for authorization of the bonds and to rendering an opinion as to the validity of the bonds and the exemption of interest on the bonds from income taxation. The opinion of Bond Counsel will not consider or extend to any documents, agreements, representations, offering circulars, or other material of any kind concerning the bonds not mentioned in this paragraph.

SECURITY

The bonds are general obligations of the Alta Loma School District, and the Board of Supervisors of San Bernardino County has the power and is obligated under the Resolution authorizing the issuance of the Bonds to levy ad valorem taxes for payment of the bonds and the interest thereon upon all property within the District subject to taxation by the District (except certain personal property which is taxable at limited rates), without limitation as to rate or amount.

TAX EXEMPT STATUS

In the opinion of Bond Counsel, interest on the bonds is exempt from all present Federal income taxes and from State of California personal income taxes under existing statutes, regulations, and court decisions.

LEGALITY FOR INVESTMENT

The bonds are legal investments in California for all trust funds and for funds of all insurance companies, commercial and savings banks, trust companies, and for State school funds, and are eligible as security for deposits of public monies in California.

NO LITIGATION

There is no litigation pending concerning the validity of the bonds, and the Board of Supervisors will furnish to the successful bidder a no-litigation certificate certifying to the foregoing at the time of the delivery of the bonds.

Litigation challenging the constitutionality under provisions of the California Constitution of the present system of levying taxes and applying funds for public school purposes was argued before the California Supreme Court on June 15, 1976, in Serrano v. Clowes, et al. (formerly known as Serrano v. Priest), Case number LA 30398.

The outcome of this litigation, and any resulting change in the sources of funds, including property taxation applied to the support of public schools and any effects thereof on the bonds are not determinable at this time. However, it is not expected that such litigation will modify the rights of the holders of bonds issued and delivered prior to the date of final resolution of the issues by the California Supreme Court to ultimate recourse to ad valorem taxes upon all the taxable property within the Alta Loma School District for the payment of the bonds if not paid from other sources.

PURPOSE OF ISSUE

Proceeds from the sale of the \$405,000 principal amount of the 1974 Election, Series 2 Bonds and \$345,000 principal amount of the 1976 Election, Series 1 Bonds will be used for authorized school purposes as described in greater detail in "The Improvement Program" section of this Official Statement.

ESTIMATED DEBT SERVICE

Table 1 presents a schedule of estimated annual debt service for the bonds currently being offered for sale and debt service on prior District bonds. Interest on the bonds is approximated at 7%.

Table 1
ALTA LOMA ELEMENTARY SCHOOL DISTRICT
Estimated Bond Service Requirements

Fiscal Year	\$405,000 1974, Series 2 Bonds and \$345,000 1976, Series 1 Bonds (4)							
	Combined	Principal Maturing Dec. 1			Combined	Estimated	Total (3) All Prior Bond Service	Estimated Grand Total All Issues
	Principal	Election	Election	Interest	Combined			
	Outstanding	1974	1976	Payable (2)	Bond			
July 1	Series 2	Series 1	Combined (1)	6/1& 12/1	Service			
1977/78	\$750,000	\$ 15,000	\$	\$ 15,000	\$ 78,225	\$ 93,225	\$ 143,218.75	\$ 236,443.75
1978/79	735,000	25,000		25,000	50,575	75,575	153,931.25	229,506.25
1979/80	710,000	25,000		25,000	48,825	73,825	148,268.75	222,093.75
1980/81	685,000	25,000		25,000	47,075	72,075	143,131.25	215,206.25
1981/82	660,000	30,000		30,000	45,150	75,150	137,993.75	213,143.75
1982/83	630,000	30,000		30,000	43,050	73,050	137,681.25	210,731.25
1983/84	600,000	30,000		30,000	40,950	70,950	142,787.50	213,737.50
1984/85	570,000	40,000		40,000	38,500	78,500	132,687.50	211,187.50
1985/86	530,000	60,000		60,000	35,000	95,000	104,337.50	199,337.50
1986/87	470,000	125,000	5,000	130,000	28,350	158,350	30,487.50	188,837.50
1987/88	340,000		70,000	70,000	21,350	91,350	87,087.50	178,437.50
1988/89	270,000		85,000	85,000	15,925	100,925	67,193.75	168,118.75
1989/90	185,000		150,000	150,000	7,700	157,700	--	157,700.00
1990/91	35,000		35,000	35,000	1,225	36,225	--	36,225.00
TOTALS		\$405,000	\$345,000	\$750,000	\$501,900	\$1,251,900	\$1,428,806.25	\$2,680,706.25

(1) Bonds dated December 1, 1976. No bonds are callable.

(2) Interest estimated at 7 percent per annum.

(3) Source: San Bernardino County Records of General Obligation Bond Service Requirements.

(4) Source: 1974 Series 2 and 1976 Series 1 Bond Service estimation prepared by Stone & Youngberg Municipal Financing Consultants, Inc.

THE IMPROVEMENT PROGRAM

The Alta Loma Elementary School District was formed in 1885. The facilities of the District include three elementary schools and one middle school. Proceeds from the sale of the \$405,000 Election 1974, Series 2 and the \$345,000 Election 1976, Series 1, totalling \$750,000 principal amount of general obligation bonds, will be issued and sold for the purpose of raising money for authorized school purposes.

Under state law, local school districts in California may qualify for state apportionments from the School Building Aid Fund to assist in the acquisition of sites and the construction and furnishing of school facilities. Participation in this state loan program must be authorized by the local school district's electorate. On March 2, 1976, voters of the Alta Loma School District authorized an additional state building aid participation in the amount of \$6,600,000. Prior authorizations aggregating \$2,850,000 for participation in the state building aid program were approved by voters in the District in 1964 and 1962.

The use of the bond proceeds will, pursuant to Education Code (Section 19590), entitle the District to receive additional State School Building Aid Funds. The bond proceeds will be expended as follows:

District contribution to the addition to Jasper Elementary School (1)	\$450,000
District contribution to the purchase of an additional school site and the construction of the first increment of a fourth elementary school (2)	<u>300,000</u>
Total	\$750,000

-
- (1) The Director of General Services, State Allocations (Exhibit to State Allocation Board Resolution 19/69913, dated 7/19/76 and modified by Exhibit 19/69913-B, dated 9/20/76), has approved an addition to Jasper Elementary School in the amount of \$1,069,758.17. The project will be financed with a District contribution of \$450,000 and State aid amounting to \$619,758.17.
 - (2) Exhibits to State Allocation Board Resolution 19/69914 and 19/69915, which are applications pertaining to projects for an additional site and construction of the first increment of an elementary school have been approved and State funds have been encumbered. The District estimates the total costs of the project described in Exhibits 19/69914 and 19/69915 will be \$1,500,000: \$300,000 from the bonds currently being offered and the remaining \$1,200,000 from voter-approved State aid.

DISTRICT ORGANIZATION AND FINANCIAL DATA

ORGANIZATION

The Alta Loma Elementary School District provides kindergarten through eighth grade educational services to residents of an area encompassing approximately 25 square miles that includes the unincorporated City of Alta Loma and the adjoining area.

The District has operated as an elementary school district under the laws of the State of California continuously since 1885. The District is governed by an independent Board of Trustees of five members who are elected at large for overlapping four-year terms. The District's affairs are administered by the Superintendent, who is appointed by the Board of Trustees. Mr. Floyd M. Stork has served the District as Superintendent since 1953. Mr. Stork has been engaged in the field of education for 26 years.

FACILITIES AND ATTENDANCE

District facilities include three elementary schools and one middle school. The District's staff includes 103 certificated, 55 classified, 7 administrative personnel and 23 part-time classified employees. The District's projected enrollment as of October 1976 is 2,450.

Table 2 shows District assessed valuations, average daily attendance, and assessed valuation per student in average daily attendance over the past five years. During this period, the District's assessed valuation increased approximately 71.1 percent and assessed valuations per unit of average daily attendance increased approximately 21.7 percent. Average daily attendance over the past five years has increased 40.5 percent from 1,779 in 1972/73 to an estimated 2,500 in 1976/77.

Table 2
ALTA LOMA ELEMENTARY SCHOOL DISTRICT
Assessed Valuation and Average Daily Attendance

Fiscal Year	Assessed Valuation (1)	Average Daily Attendance (2)	Assessed Valuation Per Unit Average Daily Attendance
1972/73	\$21,498,170	1,779	\$12,084
1973/74	22,478,800	1,973	11,393
1974/75	25,455,170	2,146	11,861
1975/76	31,250,420	2,309	13,534
1976/77	36,774,020	2,500 (3)	14,710

(1) Includes State reimbursed exemptions.

(2) Includes summer enrollments and special classes.

(3) Estimated during the period September 1976 through June 1977.

ASSESSED VALUATIONS

The San Bernardino County Assessor assesses property for District tax purposes. The State Board of Equalization reports the 1976/77 San Bernardino County valuations average 23.7 percent of full market value, except for public utility property, which is assessed by the State at 25 percent of full value.

Under California State Law, two types of exemptions of property from ad valorem taxes became effective in the 1969/70 fiscal year. One exempts 50 percent of the value of business inventories from ad valorem taxes. The other provides for an exemption of \$1,750 of the assessed valuation of an owner-occupied dwelling if the owner files for the exemption. Under a recently enacted Constitutional Amendment, the California legislature can raise this exemption. Revenue estimated to be lost to each taxing entity as a result of such exemptions is reimbursed to the taxing entity from state funds. The reimbursement is based upon total taxes which would be due on the assessed valuation of the property qualifying for these exemptions, without allowance for delinquencies. Table 3 presents the District's 1976/77 assessed valuation by tax roll, before and after these two exemptions.

Table 3

ALTA LOMA ELEMENTARY SCHOOL DISTRICT 1976/77 Assessed Valuation

Tax Roll	Taxable Assessed Valuation	Homeowners and Business Inventory Exemptions	Assessed Valuation for Revenue Purposes
Secured	\$29,506,040	\$4,490,620	\$33,996,660
Utility	1,288,370	--	1,288,370
Unsecured	<u>1,231,740</u>	<u>257,250</u>	<u>1,488,990</u>
Total	\$32,026,150	\$4,747,870	\$36,774,020

Source: San Bernardino County Auditor-Controller.

Table 4 shows a five-year history of the District's assessed valuation by tax roll prior to deductions for the two previously discussed special exemptions.

Table 4

ALTA LOMA ELEMENTARY SCHOOL DISTRICT Assessed Valuation by Tax Roll (1)

Tax Roll	1972/73	1973/74	1974/75	1975/76	1976/77
Secured Roll	\$19,919,880	\$20,757,440	\$23,367,685	\$28,317,625	\$33,996,660
Unsecured Roll	594,220	767,360	1,032,215	1,782,285	1,488,990
Utility Roll	<u>984,070</u>	<u>954,000</u>	<u>1,055,270</u>	<u>1,150,510</u>	<u>1,288,370</u>
Total	\$21,498,170	\$22,478,800	\$25,455,170	\$31,250,420	\$36,774,020

(1) Includes reimbursable exemptions.

Sources: San Bernardino County Auditor-Controller.

REVENUE LIMITATIONS

Since 1973/74, California school districts have operated under general purpose property tax revenue limitations established in legislation adopted in 1973. This legislation, however, does not impose a maximum property tax rate for the purpose of meeting general obligation bond service payments. The Board of Supervisors of San Bernardino County is required to levy ad valorem taxes without limit as to rate or amount to meet general obligation debt service of the District.

Since 1973/74 allowable annual tax rates to be applied to a district's assessed valuation have been derived from a statutory formula which takes into account a number of factors including adjustments for inflation, limited mandatory contributions to the Teachers' Retirement System, basic state aid, state equalization aid, changes in average daily attendance, and prior years' tax collections. The tax required to raise the general purpose monies is the District's maximum general purpose tax rate (see Table 5).

The District's revenue limit per unit of average daily attendance and general purpose tax rate actually levied in 1975/76 were: \$1,017.12 and \$1.4088 per \$100 assessed valuation, respectively.

In 1976/77, the revenue limit per unit of average daily attendance is \$914.77 with a general purpose tax rate of \$1.4575 per \$100 of assessed valuation.

TAX RATES

Table 5 shows the Alta Loma Elementary School District tax rate for the past five-year period. The District's total tax rate during this period ranged from \$3.0533 to \$1.8447 per \$100 assessed valuation.

Table 5
ALTA LOMA ELEMENTARY SCHOOL DISTRICT
Tax Rate Distribution by Purpose

	1972/73	1973/74	1974/75	1975/76	1976/77
General Purpose	\$1.6628	\$1.3074	\$1.3713	\$1.3024	\$1.3318
Community Services	.0320	.0426	.0500	.0500	.0500
Meals for Needy Pupils	--	--	--	.0126	.0179
State Loan Repayment	.0657	.1576	.0360	.0438	.0578
Other	.8696 (1)	--	--	--	--
Total General Purpose	<u>\$2.6301</u>	<u>\$1.5076</u>	<u>\$1.4573</u>	<u>\$1.4088</u>	<u>\$1.4575</u>
Bond Interest and Redemption	<u>.4232</u>	<u>.5845</u>	<u>.3874</u>	<u>.4891</u>	<u>.4869</u>
Total	\$3.0533	\$2.0921	\$1.8447	\$1.8978	\$1.9444

(1) Includes certificated employees' retirement .0692, classified employees' retirement .0782, health and welfare .1631, educationally handicapped .0644, education of mentally retarded .0198, unemployment insurance .0326, excess cost of education of seventh and eighth grade pupils .4423. These overrides became a part of the District's revenue limit per average daily attendance under Senate Bill 90 which became effective in fiscal year 1973/74.

Source: San Bernardino County Auditor-Controller and District audit reports.

There are 32 Tax Code Areas in the District. In the 1976/77 tax year, total tax rates within these code areas ranged from \$9.9656 to \$14.2976 per \$100 assessed valuation. Tax Code Area 5208 is the largest area by assessed valuation in the District, with a 1976/77 assessed valuation of \$12,005,020. Table 6 illustrates the record of total tax rates levied in Tax Code Area 5208 over the past five fiscal years.

Table 6
ALTA LOMA ELEMENTARY SCHOOL DISTRICT
Tax Code Area 5208
Tax Rates Per \$100 Assessed Valuation

	1972/73	1973/74	1974/75	1975/76	1976/77
County	\$3.1344	\$3.1327	\$3.1466	\$3.1466	\$3.1616
School	7.8574	6.6268	6.2341	6.2931	6.4004
County Service Areas	.3292	.3386	.2623	.3350	.3354
Fire	.4916	.6190	.7000	.7219	.7000
Flood Control Zone	.3000	.3000	.3000	.3000	.3000
Municipal Water	.3700	.4800	.4800	.5500	.6400
Metropolitan Water	.2000	.1800	.1800	.1600	.1500
Other Water	.4700	.4700	.4700	.3100	.6275
All Property	\$13.1526	\$12.1471	\$11.7730	\$11.8166	\$12.3149

Source: San Bernardino County Auditor-Controller.

A listing of large taxpayers within the District and their 1976/77 assessed valuation is presented in Table 7.

Table 7
ALTA LOMA ELEMENTARY SCHOOL DISTRICT
Major Taxpayers, Fiscal Year 1976/77

Taxpayer	Product or Service	Assessed Valuation
Multi Benefit Realty Fund IV	Shopping Center	\$634,200
Southern California Edison Company	Utilities	535,750
General Telephone Company of Calif.	Utilities	493,720
Lewis Homes	Residential Builder	430,490
Century Properties Fund 70	Mobile Home Park	313,500
Southern California Gas Company	Utility	228,720
Earl Williams and Stanley Edwards	Mobile Home Park	194,425
Benjamin J. and Melba R. Franklin	Shopping Center	188,370
M and S Enterprises	Mobile Home Park	167,625
Bennett Holding Co.	Manufacturing	159,600

Source: San Bernardino County Assessor.

TAX LEVIES, COLLECTIONS, AND DELINQUENCIES

School District secured and utility taxes appear on the same tax bill as County and City taxes, are payable in equal installments on November 1 and February 1, and become delinquent on December 10 and April 10 respectively. Taxes on properties appearing on the unsecured roll are assessed on March 1 and become delinquent the following August 31. Table 8 summarizes the general purpose secured tax levies and the amount and percentage of the levy delinquent as of June 30 for the past five fiscal years in the District's tax code areas.

Table 8
ALTA LOMA ELEMENTARY SCHOOL DISTRICT
Secured Tax Delinquency (1)

Year Ending June 30	Secured Tax Levy	Delinquent as of June 30	
		Amount	Percent
1972	\$328,343	\$23,755	.7.23%
1973	523,567	21,368	4.08
1974	282,924 (1)	5,625	1.99
1975	305,399	16,772	5.49
1976	361,274	15,343	4.25

(1) Reimbursable homeowners exemptions increased to \$1,750 from \$750, resulting in a lower taxable assessed valuation.

Source: San Bernardino Auditor-Controller.

FUND BALANCES

The tabulation below presents the surplus balances in all District funds as of June 30 for the past five fiscal years.

ALTA LOMA ELEMENTARY SCHOOL DISTRICT
Fund Balances as of June 30

Fund	1972	1973	1974	1975	1976
General Fund	\$122,262	\$133,770	\$184,335	\$220,405	\$178,201
Bond Interest and Redemption Fund	81,504	98,403	141,580	153,309	161,281
Bond Building Fund	--	318,203	222,797	180,273	--
State School Building Fund	31,958	20,567	38,106	932,330	425,109
Student Body Fund	2,149	3,091	1,696	3,059	3,960
Cafeteria Account	2,129	3,357	3,274	4,224	1,834

Source: District audit reports for years 1972, 1973, 1974 and 1975. Annual budget report for 1976 (unaudited).

GENERAL FUND INCOME AND EXPENDITURES

Table 9 presents a five-year summary of income and expenditures of the Alta Loma Elementary School District as reported in annual audits and financial reports of the District. Also included in Table 9 is the annual expenditure budget and the annual variation of these budgets to actual expenditures.

Table 9
ALTA LOMA ELEMENTARY SCHOOL DISTRICT
Summary of General Fund Income and Expenditures

	Fiscal Year				
	1970/71	1971/72	1972/73	1973/74	1974/75
Beginning Balance July 1	\$ 127,679	\$ 95,313	\$ 122,263	\$ 133,770	\$ 184,336
Adjustment to Beginning Balance	1,704	1,171	(1,269)	(5,040)	2,299
Net Beginning Balance	\$ 129,383	\$ 96,484	\$ 120,994	\$ 128,730	\$ 186,635
Income:					
Federal Sources	\$ 9,949	\$ 63,036	\$ 59,706	\$ 33,766	\$ 68,892
State Sources	540,352	576,466	593,813	1,144,546	1,337,510
County Sources	12,564	14,996	20,964	24,383	26,142
Local Sources	502,330	588,048	824,275	585,129	681,870
Incoming Transfers	215	1,453	1,744	3,316	592
Subtotal	\$1,065,410	\$1,243,999	\$1,500,502	\$1,791,140	\$2,115,006
Total Income Available	\$1,194,793	\$1,340,483	\$1,621,496	\$1,919,870	\$2,301,641
Expenditures: (1)					
Certificated Salaries	--	--	--	--	1,379,664
Classified Salaries	--	--	--	--	271,517
Employee Benefits	--	--	--	--	187,429
Books, Supplies, Equipment Replacement	--	--	--	--	88,032
Contracted Services	--	--	--	--	114,963
Administration	29,451	32,033	46,844	58,236	--
Instruction	819,090	926,714	1,074,494	1,245,634	--
Health Services	4,234	4,551	5,035	9,091	--
Public Transportation	29,451	38,467	39,601	46,033	--
Operation of Plant	76,224	81,074	102,241	100,820	--
Maintenance of Plant	14,813	15,025	14,940	14,373	--
Fixed Charges	55,734	68,109	131,847	144,965	--
Food Services	5,617	4,059	4,509	5,002	--
Community Services	5,198	6,352	7,451	10,653	--
Capital Outlay	18,381	24,699	39,236	40,090	26,264
Debt Service - Repayment					
School Building Aid Loans	37,676	9,228	13,553	33,740	11,756
Outgoing Transfers	3,709	7,910	7,975	26,898	1,610
Total Expenditures	\$1,099,480	\$1,218,221	\$1,487,726	\$1,735,535	\$2,081,235
Revised Budget Expenditures	1,098,114	1,220,253	1,500,255	1,797,376	2,089,776
Variance to Actual Expenditures	(1,366)	2,032	12,529	61,841	8,541
Ending Balance June 30	\$ 95,313	\$ 122,262	\$ 133,770	\$ 184,335	\$ 220,405

(1) Beginning in 1974/75 all school districts in the State of California were required to follow accounting and financial reporting procedures in accordance with revenue source categories and classification object code prescribed by the California State Accounting Manual. Certain expenditure items in 1974/75 cannot, therefore, be directly compared with prior years.

Source: District audit reports for individual years.

The tabulations in Table 10 show a summary of the District's 1975/76 actual income and expenditures as shown in the annual budget report. Table 10 also contains a summary of the District's 1976/77 general fund budget.

Table 10

ALTA LOMA ELEMENTARY SCHOOL DISTRICT
General Fund Income and Expenditures

	1975/76 Actual	1976/77 Budget
<u>Income</u>		
Adjusted Net Beginning Balance	\$ 225,888	\$ 178,201
Federal Income	87,330	53,700
State Income	1,571,997	1,799,400
County Income	26,409	26,800
Local Income	812,635	1,108,500
Incoming Transfers	361	--
Total Available Income	\$2,724,620	\$3,166,601
<u>Expenditures</u>		
Certified Salaries	1,662,027	1,796,280
Classified Salaries	353,077	387,622
Employee Benefits	250,893	330,200
Books, Supplies and Equipment Replacement	95,386	117,950
Contracted Services and Other Operating Expenses	138,804	158,700
Sites, Buildings, Books, Media and New Equipment	24,152	49,000
Other Outgo, Including School Building Apportionment	22,080	28,667
Total Expenditures	\$2,546,419	\$2,868,419
Appropriations for Contingencies	--	150,000
Net Ending Balance	178,201	--
General Reserve	--	148,182
Total	\$2,724,620	\$3,166,601

Source: Annual Budget Report (Form J-41), July 1, 1976 to June 30, 1977, adopted by the governing board of Alta Loma Elementary School District on August 2, 1976. The 1975/76 general fund, at this time, is unaudited.

DIRECT AND ESTIMATED OVERLAPPING BONDED DEBT

The District's general obligation bonding capacity is equal to 5 percent of its assessed valuation after all exemptions except homeowners' and business inventory, as adjusted by the Collier Factor. The Collier Factor is a comparison of a county's assessment level with the statewide average ratio. The factor is used to offset differences in assessment levels for intercounty school districts and conforms assessment to the statewide average assessment level for all property. The District's bonding capacity as reported by the San Bernardino County Auditor-Controller is \$1,895,478. Upon delivery of the Election 1974, Series 2 and Election 1976, Series 1 currently being offered, the District's general obligation bonded debt will be \$1,890,000. Table 11 is a statement of direct and estimated overlapping bonded debt of the District as of November 22, 1976.

Table 11

ALTA LOMA ELEMENTARY SCHOOL DISTRICT

Statement of Direct and Estimated Overlapping Bonded Debt (1)

	Estimated population	15,000	
	Assessed valuation	\$ 36,774,020 (2)	
	Estimated real value	\$154,880,000 (3)	

Public Entity	Percent Applicable (4)	Estimated Debt Applicable November 22, 1976
San Bernardino County	1.374%	\$ 190,643 (5)
San Bernardino Free Library	1.821	19,120
Metropolitan Water District	0.082	444,546
Chino Basin Municipal Water District	3.652	536,478
Cucamonga County Water District	33.834	1,084,041
Cucamonga County Water District ID #2	98.823	185,787
Cucamonga County Water District ID #1963-1	27.303	324,905
Chaffey Union Jr. College District	3.677	23,900
Chaffey Union High School District	5.931	343,998
Alta Loma School District	100.000	1,890,000 (6)
City of Upland	0.002	55
TOTAL GROSS DIRECT AND OVERLAPPING BONDED DEBT		\$5,043,473
Less: Cucamonga CWD (70% self-supporting) and ID#2		
(100% self-supporting)		944,615
City of Upland water bonds (100% self-supporting)		26
TOTAL NET DIRECT AND OVERLAPPING BONDED DEBT		\$4,098,832

	Ratio To		
	Assessed Valuation	Real Value	Per Capita
Assessed valuation	-	-	\$2,451
Direct debt	5.14%	1.22%	\$ 126
Net direct and estimated overlapping bonded debt	11.15%	2.65%	\$ 273

(1) Compiled in cooperation with California Municipal Statistics, Inc.

(2) The 1976/77 assessed valuation is before deduction of \$4,747,870 homeowners' and business inventory exemptions, the taxes on which are paid by the State of California.

(3) State Board of Equalization reports that 1976/77 San Bernardino County Assessed Valuations averaged 23.7% of full market value. Public utility property (\$1,288,370) is assessed at 25% of full market value.

(4) All percentages are calculated on the 1975/76 assessed valuation except for San Bernardino County and the Metropolitan Water District which are calculated on 1976/77 assessed valuations.

(5) Excludes share of \$801,722 of lease purchase obligations (\$11,016) which are not bonded debt.

(6) Includes \$750,000 to be sold on November 22, 1976.

As of June 30, 1976, the District's State School Building Aid repayable amounted to \$2,613,609 (Chaffee Union High School District share \$8,948 and Alta Loma School District \$2,604,661). The District's share of authorized unsold bonds is as follows: Alta Loma School District (\$1,155,000) Metropolitan Water District (\$299,300).

OTHER INDEBTEDNESS

The District maintains a lease contract, which expires August 13, 1977, for the use of three classroom trailers at an annual cost of \$7,656. The District has five-year lease purchase contracts, with option to purchase, on two busses at an annual rate of \$9,691. These are obligations of the general fund and separate from the debt service redemption fund.

EMPLOYER-EMPLOYEE RELATIONS

Certificated personnel of the Alta Loma Elementary School District are members of the recognized professional organization of the Alta Loma Educators Association (California Teachers Association Affiliate). Classified employees are not members of any professional organization.

The District is currently negotiating employment contracts with its certificated personnel. The 1976/77 Budget was adopted by the governing board of the District on August 2, 1976.

Effective July 1, 1976, provisions of the Rodda Act codified as Chapter 961 of the 1975 Statutes affects all school districts in California. In case of labor disputes, local grievance procedures may be operative (if established by contract), or both parties may agree to submit grievances to final and binding arbitration pursuant to rules adopted by the Educational Employment Relations Board, which administers the Act. The Act's provisions with respect to the rights, obligations, and unfair practices applicable to management and labor became effective April 1, 1976.

PENSION PLANS

The District participates in the State of California Teachers' Retirement System (STRS). This plan covers basically all full-time certificated employees. The District's contribution to STRS for fiscal year 1975/76 amounted to \$88,985, which includes both current costs and backfunding.

The District also participates in the State of California Public Employees' Retirement System (PERS). This plan covers all classified personnel who are employed at least 50 percent of the workweek. The District's contribution to PERS for 1975/76 amounted to \$24,937, which includes both current costs and backfunding.

Both systems are operated on a statewide basis. Records are maintained in such a way that information relating to vested benefits, unfunded vested benefits, and prior service costs are not available for the District.

The State Teachers' Retirement System. This System is administered by the State of California with contributions from both employees and employers. The State of California also contributes \$135,000,000 annually until the year 2002, subject to annual legislative appropriation. The present value of these future State contributions was carried at \$1,747,624,637 on June 30, 1975.

The actuarial method used is a projected benefit cost method where level normal rates sufficient to fund benefits over the entire service life of members are computed. The contribution rates are established to fund current service and interest on the unfunded liabilities not being amortized by the state contribution (\$6,257,975,000). The System's financial statements are prepared on the accrual basis (Annual Financial Report State Teachers' Retirement System, 6/30/74).

As of June 30, 1975, the total unfunded liabilities of the State Teachers' Retirement System were: \$1,747,624,637 (State contribution which is being amortized by the \$135,000,000 annual contribution) and \$6,257,975,000 (member contribution on which interest is being paid). This unfunded total liability is \$8,005,599,637 (Annual Financial Report, State Teachers' Retirement System, 6/30/75). In 1972, legislation (AB 543) was passed to put the System on a fully funded basis over a period of thirty years. The State Teachers' Retirement System reports that further changes in the contribution rates are now under study.

The Teachers' Retirement System's actuary is Milliman and Robertson, Inc. of Seattle, Washington; Investment Counsel for equities is B A Investment Management Company, San Francisco, California; auditor is Coopers and Lybrand, Sacramento, California.

The State Public Employees' Retirement System. This system, originally established in 1931, is governed by an eleven member Board of Administration. Administrative functions are carried out under the direction of an Executive Officer with a current staff of approximately 475. As of June 30, 1975, there were 535,786 members, of which approximately 10% are classified as "safety" members (principally fire and police duties) and the balance are classified as "miscellaneous" members (management, administrative, staff, operational and clerical employees).

Approximately 33% of the members are state personnel and the balance (67%) are public agency personnel. As of June 30, 1975, the System provided retirement, death and survivor benefits under 901 contracts for about 1,900 public agency employers (cities, counties, and other public agencies) with 356,517 members. The System's funding is by employer and employee contributions together with investment income. Contributions fluctuate yearly depending on the number of members and their respective salary schedules. The annual contribution by the State of California for the 1974 and 1975 fiscal years, as reported by the State Controller, was \$162,649,578 and \$231,057,854, respectively. The System's financial statements are prepared on an accrual basis of accounting and the System's auditor is Coopers and Lybrand, Sacramento, California. Citicorp Investment Management, Inc., San Francisco, provides investment advisory services. The System's actuarial activities are conducted internally on a continuous basis, with an experience analysis being conducted no less than every four years.

Total assets of the System at June 30, 1975 were \$7,010,663,041, according to the Annual Report of the State Controller. Of this amount, net assets of \$6,970,264,122 were available for benefits. Comparable figures for June 30, 1974 were \$6,233,924,599 and \$6,207,963,069, respectively. The unfunded obligation of the System was determined to be \$4,907,998,387 at June 30, 1974 by the independent auditors. This represents the present value of future state contributions of approximately \$2.8 billion and other member contributions of approximately \$2.1 billion. The total unfunded obligation does not take into account the provisions of Chapter 187, Statutes of 1975, which prescribed a new increased contribution rate by the state with respect to state miscellaneous members. The comparable amount for June 30, 1975, is not available.

The amount of the respective unfunded liabilities will vary from time to time depending upon the actuarial assumptions utilized, rates of return and salary scales. The present System policy is designed to satisfy the unfunded obligation by the year 2000 (Source: Retirement System).

ECONOMY OF THE DISTRICT

The Alta Loma School District encompasses approximately 25 square miles in southwestern San Bernardino County. It includes the unincorporated community of Alta Loma and extends north into the San Bernardino National Forest. Bordering the District on the west is the City of Upland. To the south and east, respectively, are the unincorporated communities of Cucamonga and Etiwanda. Alta Loma is approximately 40 miles east of Los Angeles and 19 miles west of San Bernardino. The District has a present estimated population of 15,000 persons.

The District contains horse ranches, citrus groves, vineyards, and a winery. However, agricultural lands are giving way to urban encroachment as high land costs and overcrowding in Los Angeles and Orange Counties cause residents of those areas to seek living space in San Bernardino County. Residential construction activity in the District is at a high level, as discussed in a later section of this Official Statement.

There are ten manufacturing plants in the District, with two employing more than 50 persons each. Industrial and distribution activities are served by a branch line of the Southern Pacific Railroad.

Chaffey College, a community college serving southwestern San Bernardino County, is located in the District.

POPULATION AND HOUSING

The San Bernardino County Planning Department compiles population and housing data for Planning District 6, which embraces Alta Loma, Etiwanda, and a small portion of Cucamonga. In 1970, this area had a population of 10,552 and 3,008 dwelling units, as determined by the Federal Census. In April 1975 the County Planning Department conducted a special countywide census and reported 16,696 residents for Planning District 6, a gain of 58 percent over the five-year period.

Population data utilizing master plans of elementary school districts serving the Alta Loma-Cucamonga-Etiwanda area, plus other sources, disclose the following population estimates and projections for the three contiguous communities.

POPULATION DATA AND PROJECTIONS

	Alta Loma	Cucamonga	Etiwanda
1975 Census	10,300	13,900	1,400*
1976	12,575	15,400	1,600
1980	28,100	24,800	2,500
1985	40,000	43,000	8,000

* Not Census data.

Sources: Local school districts, Cucamonga County Water District, Southwest Water District, San Bernardino County Planning Offices, and Rancho Cucamonga Library.

Census data by type of housing unit and home ownership are not available for Alta Loma. Local real estate sources state that housing in the community consists almost entirely of single-family dwellings. Home ownership is believed to be very high, based on sales transaction records.

EMPLOYMENT

Employment opportunities within the District are largely in education, trade, personal services, and manufacturing. Largest District employers are Chaffey College, the Alta Loma School District, the American Can Company, which employs 125 at a local plant producing plastic bottles, and Bennett Industries, a fabricator of steel shipping containers with a payroll of 80. Two shopping centers employ an undetermined number of people in trade and personal services.

A listing of the largest employers in Alta Loma and the adjacent communities of Cucamonga and Etiwanda is presented below.

Residents of the District are within convenient commuting distance of major employment centers in the San Bernardino-Riverside-Ontario Metropolitan Area. Employment opportunities in this general area are discussed in the section entitled "San Bernardino Valley." Also, many District residents commute to the Los Angeles area and to northern Orange County.

LARGEST EMPLOYERS IN ALTA LOMA AND VICINITY

Company	Product/Service	Employment
<u>Alta Loma</u>		
Chaffey College	Education	740*
Alta Loma School District	Education	150-200
American Can Co.	Plastic bottles	125
Bennett Industries, Inc.	Steel shipping containers	80
Etch-Co. Inc.	Printed circuit boards	11-50
Opici Winery, Inc.	Wine	11-50
Pace/Setter Products, Inc.	Chick Hatchery	11-50
Scheu Manufacturing Co.	L. P. heaters	11-50
Smooth Ride Trim Controls	Trim tabs for boats	11-50
<u>Cucamonga</u>		
Abitibi Corp.	Pre-finished plywood panels	51-100
Circuit Design	Circuit board	51-100
Columbia Ribbon & Carbon Mfg. Co. Inc.	Carbon products	101-250
Data-Design Laboratories	Electronics, technical training & education materials	101-250
Doughboy Recreational	Swimming pool equipment	101-250
Fasson, Div. of Avery Products	Adhesive coated paper, film & foils	101-250
Foremost Furniture Factories of California, Inc.	Wood household furniture	101-250
Frito-Lay, Inc.	Snack foods	101-250
General Knit of California	Fabric manufacturing	300
General Marble Corp.	Marble sinks, basins, cabinets	51-100
Metropolitan Wire Goods Corp.	Fabricated wire products	101-250
Mobile Industries, Inc.	Mobile homes	51-100
Otis Elevator Co.	Elevators, moving stairways	101-250
Phillips Industries, Inc.	Aluminum windows & doors, steel roofs	101-250
Quality Farms	Egg production	51-100
Robert Manufacturing Co.	Fittings, valves, connectors	101-250
Safetran Systems Corp.	Railroad communication equipment	101-250
Santa Anita Mobile Homes Inc.	Mobile homes	101-250
Star Finishing Co.	Carpet dyeing	51-100
Sunshine Foods	Egg production	101-250
Western Diversified Metals	Copper & aluminum nuggets	51-100
<u>Etiwanda</u>		
Ameron Pipe Products	Concrete pipe	51-100
Ameron Steel Producing Division	Steel bar, coil, wire, mesh	251-500
National Can Corp.	Metal containers	251-500

*Includes part-time employees and evening instructors.

Sources: San Bernardino County Industrial Director and original sources.

INDUSTRY

Although industrial activity in the District is limited at present, economic studies prepared for the San Bernardino County General Plan by Wilsey & Ham indicate that the West Valley area of San Bernardino County, of which the District is a part, can become the third most important area of industrial concentration in Southern California, ranking behind only Vernon-Los Angeles-Commerce and the Wilmington-San Pedro areas.

Several factors combine to make the general area attractive for industrial development:

- Pressures of urban development from the Los Angeles Basin and the area's proximity to that market.
- The presence of Kaiser Steel, the only fully integrated steel plant on the Pacific Coast, within a few miles of the District.
- Outstanding rail, highway, and air transportation facilities.
- Major utility installations including a 36-inch interstate gas transmission main; a 1,000,000 kw generating plant near the District; two major transmission lines of the Metropolitan Water District; and two interconnected industrial waste outfall lines.
- Availability of a ready labor supply.
- Availability of large tracts of flat, readily developable land at comparatively low costs.

COMMERCIAL

Commercial activity in the District is concentrated at two shopping centers along Base Line Road, the southern boundary of the District. Near Carnelian Avenue are Bank of America, Stater Brothers Market, Sprouse-Reitz Department Store, and various retail and service establishments. At Archibald Avenue are Alpha Beta Markets, Thrifty Drug and Discount Store, Pomona Federal Savings and Loan and other commercial establishments. Both shopping centers are new, having been constructed within the past few years.

Taxable transactions are not available for Alta Loma. An indication of economic strength in the area can be obtained from the level of taxable transactions in the incorporated communities of Upland, Ontario and Fontana, situated on the west, south and east, respectively. Shown below are taxable sales data for these cities reported by the State Board of Equalization.

TAXABLE TRANSACTIONS, NEIGHBORING CITIES

	1972	1973	1974	1975
Upland	\$ 56,471,000	\$ 66,890,000	\$ 72,656,000	\$ 80,906,000
Ontario	131,543,000	147,862,000	150,845,000	164,057,000
Fontana	51,378,000	57,956,000	62,431,000	67,688,000

CONSTRUCTION ACTIVITY

Building permit valuations for Alta Loma are not segregated by San Bernardino County. However, the vigorous pace of new residential construction in Alta Loma is reflected in data compiled by the District and by a leading title insurance company, as described below.

The District, as part of its continuing studies of student enrollment, estimates that there were 3,225 occupied homes in the District as of October 1976. An additional 495 homes were under construction, and grading operations were underway to prepare 4,362 lots for the start of construction. While over 85 percent of existing homes are in the western part of the District, more than 60 percent of the lots now being graded are located in the sparsely populated eastern sector near Chaffey College.

Developer activity is monitored quarterly throughout Southern California by First American Title Insurance Co. of Santa Ana, Orange County. According to this firm's most recent bulletin, the Upland-Cucamonga-Alta Loma area was the second most active area in San Bernardino County for residential construction during the second quarter of 1976, and led the county with 15 new tracts recorded containing 572 units. The report covers activity of all developers constructing three or more homes.

We have separated out the figures pertaining to Alta Loma. In the summary below are the names of principal developers active as of the second quarter of 1976, the total number of units scheduled, the number of units completed during the quarter, and total units sold. Virtually all are single family homes. As noted in the summary, 17 builders had scheduled a total of 1,217 units, completed 585, and sold 482. The homes are largely in the \$50,000-\$80,000 price range. The fact that the number of units scheduled is more than double the number completed is further evidence of Alta Loma's attraction to home builders.

RESIDENTIAL DEVELOPER ACTIVITY IN ALTA LOMA STATUS AS OF SECOND QUARTER 1976

Developer	Total Units	Number Completed	Total Sales
Crowell/Leventhal, Inc.	334	183	112
Bob Jensen Builders, Inc.	212	120	108
San Sebastian Land Co.	45	37	35
Lewis Homes of California	136	71	61
Pomona Service Co.	28	28	28
Coral Investment Co.	93	93	85
R. L. Severs & Sons, Inc.	32	0	0
San Miguel Co., Inc.	60	53	53
Security Title Insurance	12	0	0
Sunflower Land Co.	42	0	0
Multi-Benefit Realty Fund IV	11	0	0
Boruchin Enterprises, Inc.	55	0	0
Vanguard Builders, Inc.	35	0	0
Gary Miller & Cathleen Miller	19	0	0
Regency Estates	28	0	0
Pomona Service & Shelly Inv.	34	0	0
Walton Asso. Comps.	41	0	0
Totals	1,217	585	482

Source: "Recorded Facts", First American Title Insurance Co. of
Santa Ana, California.

TRANSPORTATION

The District is well served by major transcontinental rail, highway, and air transportation facilities.

The Southern Pacific Railroad maintains a branch line serving industrial sections of the District. A short distance to the south are main lines of Southern Pacific, Union Pacific, and the Atchison, Topeka, and Santa Fe Railway.

Traversing the District from east to west is State Highway 30. Two miles south of the District is U. S. 66 (Foothill Boulevard), and five miles south of the District is Interstate 10 (San Bernardino Freeway), the major connecting link between Los Angeles and the San Bernardino-Riverside-Ontario Metropolitan Area.

Ontario International Airport, four miles south of the District, is a dominant factor in the industrial development and future potential of the area. The existence of the airport is considered a major attraction in the location of industries for whom air freight and transportation of personnel are considered of growing importance.

Nine air carriers have regularly scheduled flights to and from Ontario International Airport. United Airlines also handles freight shipments out of Ontario for all flights from Ontario or Los Angeles International Airport.

Operation of the airport is under the control of the Los Angeles Department of Airports. The Department will spend more than \$100 million in improvements at Ontario in accordance with its master plan by 1980. The 1,450-acre terminal, second largest in Southern California, accommodates more than 1.2 million passengers and over four million pounds of air cargo annually.

Interurban bus service is provided by Southern California Rapid Transit, Greyhound Bus Lines and Continental Trailways. Local bus service in the communities of Alta Loma, Cucamonga and Montclair is scheduled by the West Valley Transit Service Authority, which initiated service in January 1975.

Shipping facilities to intercoastal and world markets are available at Los Angeles Harbor and Port of Long Beach, approximately one hour's drive to the southwest via the Los Angeles freeway network.

UTILITIES

Utility services to the District are supplied by the following companies:

Electric power:	Southern California Edison Co.
Natural gas:	Southern California Gas Co.
Telephone:	General Telephone Co. of California
Water and sewer:	Cucamonga County Water District

EDUCATION

The District is part of the Chaffey Union High School District, operating six high schools in the area, and the Chaffey Community College District, which administers Chaffey College in Alta Loma. Chaffey College was founded in 1883 as a preparatory school, organized as a junior college in 1916, and reorganized as a junior college in 1922. The campus was relocated

to its present site in 1960. In the fall of 1975 Chaffey College had a total enrollment of 11,897 and a full-time enrollment of 4,626.

The college offers two-year programs for both terminal programs and for students planning to transfer to a four-year institution. Programs and facilities include an aeronautics building located at Ontario Airport, business education, creative arts, electronics, lithography and photography, life sciences, physical sciences and language arts. Campus facilities include an administration building, a student and faculty campus center, gymnasium, library, social hall, swimming facilities, a \$600,000 life sciences lecture room and a \$500,000 campus center. The college operates Skill Centers at Ontario International Airport and in Fontana. Vocational courses at these locations are offered to 1,100 adult education participants. The Daniel B. Milliken Planetarium at Chaffey College has a reproduction of the sky under a dome. Other features are displays of the universe and an outside terrarium.

Within a 30-mile radius of Alta Loma are such well-known degree institutions as the University of California at Riverside, San Bernardino State College, California State Polytechnic University at Pomona, University of Redlands, Loma Linda University, and the Claremont Colleges (Scripps, Pomona, Claremont, Harvey Mudd, Pitzer, and the Claremont Graduate School).

COMMUNITY FACILITIES AND RECREATION

Hospital care is available at the 309-bed San Antonio Community Hospital in Upland and at two general hospitals in Ontario with a combined capacity of 332 beds. There are convalescent hospitals at Alta Loma and Upland having a total of more than 300 beds.

The Rancho Cucamonga Branch Library, operated by San Bernardino County, is located near the southern boundary of the District.

The Upland News and Cucamonga Times provide local news coverage. The Los Angeles Times maintains offices in both communities. Radio station KSOM AM-FM broadcasts from nearby Cucamonga.

Bank of America and the First National Bank and Trust Company operate branch offices in Alta Loma. Pomona First Federal Savings and Loan Association maintains a local office.

Fire protection services are provided by the Foothill Fire Protection District, which operates a well-equipped station near the center of the District. San Bernardino County provides police protection at county facilities located in Ontario.

The northern portion of the District extends into the San Bernardino National Forest affording many opportunities for outdoor activities such as hiking, camping, skiing, fishing, and boating. Bordering this area to the west is the Angeles National Forest. Both national forests have wilderness areas for public recreation.

The \$1.2 million Cucamonga-Guasti County Regional Park, located a few miles south of the District, opened in May 1974. The park has a one-half acre lagoon for swimming and two lakes, one for fishing and boating and the other reserved for fishing only. Golf courses within the community area are La Mancha Golf Course and Red Hill Country Club. The latter is a private course.

The 697-acre, \$25.5 million Ontario Motor Speedway is located between the District and the San Bernardino Freeway. The speedway includes a 2.5 mile oval track for cars of the Indianapolis caliber, a 3.5 mile road race circuit, and a quarter-mile drag strip. Permanent

grandstand seats will accommodate 85,000; portable stands and infield spectators extend the audience capacity to over 200,000. Parking is available for 51,000 vehicles.

POSSIBLE INCORPORATION

The unincorporated communities of Cucamonga and Etiwanda border Alta Loma on the south and east, respectively. In response to local requests, the supervisors of San Bernardino County appointed a Municipal Advisory Council in 1972 to explore the feasibility of incorporating the three communities as a single city. The Council is composed of seven members—two from each community and a representative-at-large from Southern California Edison Co., whose properties represent a large portion of assessed valuation.

Early in 1975 the Council secured a two-year extension of a zone of influence from the Local Agency Formation Commission. This has the effect of protecting the three communities from annexation while studies and hearings proceed. It is expected that local residents will have the opportunity to vote on incorporation within the coming year.

SAN BERNARDINO VALLEY

Alta Loma lies in the heart of the fifth largest metropolitan area in California, with a population in excess of 1,200,000.

The San Bernardino-Riverside-Ontario Metropolitan Area is fortunate to have a wide variety of basic industries such as steel, agriculture, electronics, tourism, military installations, government facilities, and minerals. The only integrated steel mill on the Pacific Coast is located at Fontana, eight miles east of the District. The area accounts for 70 percent of the raw steel output in California.

The growing sophistication of the area as a manufacturing center is illustrated by the expanding aerospace-electronics industry, once closely tied to defense markets, but now increasingly committed to commercial production. Centers of industrial employment in the Valley are San Bernardino, Fontana, Ontario, Redlands, and Riverside.

EMPLOYMENT

Employment patterns in the San Bernardino-Riverside-Ontario Labor Market Area are reported periodically by the State Department of Employment Development. In August 1976 this labor market supported 437,200 civilian employees, including 333,300 nonagricultural wage and salary workers and 17,800 agricultural workers. Of the nonagricultural workers, 26 percent are on government payrolls, largely at the state and local government level. Trade, services, and manufacturing are the other leading sources of jobs, in that order. Of more than 52,000 workers in manufacturing, nearly 74 percent are engaged in durable goods production. Transportation equipment and primary metals are the leading industries in this group. A summary of employment by industry throughout the metropolitan area appears below, and a list of large employers appears on page 25.

At August 1976 the seasonally adjusted unemployment rate was 9.6 percent of the labor force compared with 9.5 percent the previous August. The adjusted rate was 9.7 percent, unchanged from the previous August.

SAN BERNARDINO-RIVERSIDE-ONTARIO LABOR MARKET

Wage & Salary Employment by Industry

Industry	August 1976	August 1975
Manufacturing	52,300	51,400
Mineral extraction	2,400	2,400
Construction	12,500	12,900
Transportation, communications, utilities	18,500	18,600
Trade	82,700	80,500
Finance, insurance, real estate	12,200	12,100
Services	67,700	67,100
Government	85,000	85,500
Total Nonagricultural	333,300	330,500
Agriculture	17,800	18,500

Source: California Department of Employment Development.

SAN BERNARDINO-RIVERSIDE-ONTARIO METROPOLITAN AREA
Major Employers

Employer	Product/Service	No. of Employees
Manufacturing Employment:		
Alcan Aluminum Corporation	Aluminum mill products	750
Amax Aluminum Mill Products, Inc.	Aluminum sheet, tubing	1,100
Bourns, Inc.	Precision electro mech. instruments	1,600
California Portland Cement Co.	Cement	251-500
FMC Corporation	Food processing machinery	400
Freightliner Corp.	Trucks	501-1,000
General Electric Co.	Appliances	1,000
General Electric Co.	Aviation services	251-500
Hanford Foundry Co.	Steel castings	300
Hooker Industries, Inc.	Exhaust systems	251-500
Kaiser Steel Corporation	Steel and iron	8,000
Kaiser Steel Fabricating Division	Steel plate/pressure vessels	500
Kaiser Cement & Gypsum Corp.	Cement, limestone	251-500
Kerr-McGee Chemical Corp.	Minerals	501-1,000
Lily-Tulip Division, Owens-Illinois	Paper cups and containers	450
Lockheed Aircraft Service Co.	Aircraft products	1,000
Lockheed Propulsion Company	Propellants, rocket motors	1,000
Matich Bros.	Asphalt	250-500
Muskin Corp., sub. of American Cement	Recreational vehicles	250-500
Rohr Corporation	Aerospace components	1,500
Southwestern Portland Cement Co.	Cement	251-500
Sun Company, The	Printing and publishing	400
Sunkist Growers, Inc.	Citrus by-products	501-1,000
Superior Draperies	Draperies	250-500
Non-Manufacturing Employment:		
Central City Mall	Regional shopping center	3,000
General Telephone Company	Communications	350
Inland Center Mall	Regional shopping center	2,500
Kasler Corp.	Highway construction	250-500
Loma Linda University & Hospital	University and hospital	2,900
March Air Force Base	Defense	1,300
Norton Air Force Base	Military	11,000
San Bernardino County	County administration	2,800
San Bernardino School System	Unified school system	2,700
San Bernardino State College	State college	400
San Bernardino Valley College	Community college	700
Santa Fe Railroad	Transportation	3,000
Southern Pacific Railroad	Transportation	800
Southern California Edison	Electrical - utility	600
Southern California Gas Co.	Gas - utility	250
TRW Systems Group	Research/program management	750
University of California, Riverside	Education	2,500

AGRICULTURE

Extending about 40 miles in an east-west direction, the fertile San Bernardino Valley is a major agricultural area. It forms a part of the citrus belt of Southern California, and is the leading dairy producing area in the nation. Gross value of farm products in San Bernardino County exceeded \$308 million in 1975, highest value on record for the county. There were 18 commodities with a valuation in excess of one million dollars, headed by milk and eggs. Together, these two products accounted for over 73 percent of the total gross value of farm production in San Bernardino County in 1975.

The tabulation below presents county agricultural production values by individual years since 1972. A list of the million-dollar crops in 1975, reported by the County Agricultural Commissioner, accompanies the tabulation.

SAN BERNARDINO COUNTY Gross Value of Farm Production

	1972	1973	1974	1975
Fruit and nuts	\$ 21,475,400	\$ 32,534,100	\$ 20,596,500	\$ 16,690,800
Vegetables	2,058,000	2,273,000	3,454,500	3,693,600
Field crops	6,472,000	9,074,000	12,065,100	13,823,000
Seed crops	45,300	101,600	96,900	92,100
Nursery prod., cut flowers	4,117,200	3,551,200	4,462,700	4,751,800
Apiary products	662,700	1,302,200	1,174,000	924,200
Livestock and poultry	30,655,000	41,786,000	37,832,400	41,958,000
Animal products	<u>126,387,700</u>	<u>172,828,000</u>	<u>211,757,500</u>	<u>226,740,000</u>
Total Value	\$191,873,300	\$263,450,100	\$291,439,600	\$308,673,500

SAN BERNARDINO COUNTY MILLION DOLLAR CROPS

1. Milk	\$173,486,000	10. Lemons	\$2,820,800
2. Eggs	52,978,000	11. Grapefruit	2,262,400
3. Cattle and Calves	19,581,000	12. Grapes	2,144,900
4. Turkeys	11,690,000	13. Baby Chicks	1,967,000
5. Alfalfa Hay	6,767,700	14. Pullets	1,947,900
6. Nursery Products	4,751,800	15. Pasture-Permanent	1,814,700
7. Chicken Fryers	4,217,400	16. Grain Hay	1,461,000
8. Navel Oranges	3,728,200	17. Apples	1,335,500
9. Valencia Oranges	3,709,400	18. Hogs and Pigs	1,090,400

Source: County Agricultural Commissioner.

NEW CONSTRUCTION

Over the past five years, the value of building permits in San Bernardino County averaged more than \$244 million annually. About 65 percent of this total valuation consists of residential construction.

In 1975 building permit valuation in the county established an all-time high. New industrial valuation exceeded \$38 million, more than three times the annual average for the previous four years.

SAN BERNARDINO COUNTY Building Permit Valuation (\$000 Omitted)

	1971	1972	1973	1974	1975
Residential	\$136,296	\$170,013	\$153,279	\$119,449	\$217,067
Nonresidential	<u>89,934</u>	<u>73,991</u>	<u>90,455</u>	<u>78,019</u>	<u>94,005</u>
Total	\$226,230	\$244,004	\$243,734	\$197,468	\$311,072

Source: "California Construction Trends", Security Pacific Bank.

76 04029

U.C. BERKELEY LIBRARIES



C123316550

INSTITUTE OF GOVERNMENTAL
STUDIES LIBRARY

MAR 20 2025

UNIVERSITY OF CALIFORNIA

